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## Introduction

The report presented to Business Board last year by the Division of University Advancement covered the progress of the University of Toronto's advancement program over the roughly ten years of campaign preparation to its successful execution and landmark conclusion. This year's report presents the measures that have been taken to build on the accomplishments of the 1997-2003 campaign, and the preparations and objectives underway for the launch of the University of Toronto's next major campaign.

During the 2004-05 fiscal year, the University attracted approximately \$85 million in new gifts and pledges. In doing so, one of the primary objectives set in the early stages of campaign planning was achieved: to move from raising approximately \$20 million per year a decade ago, to sustained support of \$80 to \$100 million per year following the campaign.

In 2004-2005, we maintained our momentum in securing gifts and stewarding our donors, and we launched a major initiative aimed at donor acquisition – the opening of a new donor calling centre at 89 Chestnut – one of the largest such centres in North America. The Division continued to strengthen ties with alumni, and engaged in efforts to involve them in university life. An excellent example was their enthusiastic involvement in the advocacy programs that supported the University's submission to the Rae Review and the Government of Ontario during the pre-budget consulting process.

The University will be entering the "Stepping UP" years with a dramatically strengthened advancement base. On behalf of my colleagues at DUA, it remains a great privilege to work with faculty, students, staff, alumni and friends for the advancement of the University of Toronto.

Rivi M. Frankle  
Acting Vice-President and Chief Advancement Officer  
University of Toronto

## 2004-05 Divisional Objectives

This report provides an overview of the progress made by the Division of University Advancement in achieving the objectives presented to Business Board in our 2003-2004 report. The overriding goal for the past year was to maximize the Division's contribution to resource generation. At the same time, an analysis of the Division's structure and operations began in preparation for the next campaign, which is expected to launch in late 2007 or early 2008.

The Division's activities over the past year were defined by the following five priorities which were presented to Business Board in the fall of 2004:

1. Develop the Case for Support for "Stepping UP" by working with the academic leadership to translate academic objectives into priorities for private funding.
2. Build the basis for a focused communications strategy and revitalized institutional marketing and promotion program, aimed at continued strengthening of the University's profile with the media and among current and prospective students and faculty, government, alumni, donors, national and international corporations and foundations, staff, friends and community groups.
3. Maintain the intensity of donor stewardship, cultivation, and solicitation to ensure that the University continues to raise \$80 million to \$100 million per year in gifts and pledges, while building the donor relationships that are critical to U of T's fund raising potential and the success of the next major advancement initiative.
4. Ensure that the UTAA, the President's International Alumni Council and divisional alumni groups continue to evolve as effective means for alumni to build and maintain meaningful relationships with their university. In addition, the size of the University's alumni body, which grows by some 10,000 each year, will enable DUA to continue developing new services, e.g., affinity programs, sponsorship, tours, etc., beyond its current base of 50,000 client accounts.
5. Restructure the Division of University Advancement as required to build on the Campaign's success and best prepare it for the

next major advancement initiative. Enhancing the Division's effectiveness will strengthen its ability to generate private support and raise the University's profile.

There were several events during the past year which affected the timing and the fulfillment of some of these goals. Notably, the Presidential transition, the Rae Review, and the deferral of a decision by the University about the structure of public affairs/communications all figured prominently in the reworking of DUA's goals and priorities throughout the year. In addition, significant attention was focused on the transition following the departure of Dr. Jon Dellandrea at the end of June.

# Analysis of 2004-05 Performance against Objectives

- 1. Develop the case for support for “Stepping UP” and work with the Provost and with Principals and Deans to develop descriptions of the next generation of academic priorities for which private support will be sought.*

The process of developing the new catalogue of advancement priorities was initiated with the divisions this year and the first round of divisional meetings completed. Efforts will continue over the next year as divisional plans and funding priorities continue to evolve.

A communications strategy was developed to support the roll-out of the final Academic Plan. Initiatives included: the development of a visual identity for Stepping UP; the coordination of an internal communications strategy including the production of a four page Stepping UP insert for the *Bulletin* in January 2005 and e-mails from the Provost to internal staff and faculty groups; collaboration with the Provost's office to identify tri-campus initiatives profiled in weekly stories illustrating key priority objectives of the Plan and appearing on a dedicated Stepping UP web page that is linked from the University's home page; a story on Stepping UP in the March, 2005 issue of the *U of T Magazine*, “Tomorrow's University of Toronto”, as well as an introduction to Stepping UP and its goals from Interim-President Iacobucci in the President's message section of the *Magazine*.

- 2. Build the basis for a refocused communications strategy and revitalized institutional marketing and promotional program to increase the University's profile.*

A comprehensive review of the University's communications program was conducted during the term of the Interim President. The review took into account the requirements of the President and the Vice-Presidential portfolios in the development of a series of comprehensive internal and external communications objectives and strategies; the degree to which the University's current communications program meets those objectives, both in their own regard, and in comparison to best practices at peer institutions; the best organizational structure to achieve the University's communications objectives; what might

constitute the best branding strategy for the University; and considerations for the development and implementation of the best internet strategy to continue to raise the University's profile.

During and following the review, DUA continued to implement a communications program supporting the University's key objectives. The following initiatives were undertaken:

### **Interportfolio Collaboration**

DUA collaborated closely with Presidential and Vice-Presidential portfolios on the following initiatives:

- The development and implementation of a communications and lobbying strategy in support of the University's submission to the Rae Review and subsequently, in the weeks leading to the 2005 Provincial Budget announcement. These efforts took place in collaboration with the Interim-President and Vice-President, Government Relations.
- Support of the communications needs of the Vice-President, Human Resources and Equity. This included assistance in the preparation of the University's application submission for selection by *Maclean's* as one of Canada's top 100 employers, updating and editing the University's Employee Orientation Guide and ongoing communications needs with respect to arising issues.
- Providing funding together with the Vice-President, Research for the production of one hour of programming of compelling and newsworthy research initiatives that is broadcast each week by CIUT. The programs are designed to increase communication and awareness of the University's research and philanthropic partnerships.
- Coordination with the Provost's office of an advertisement in "New Knowledge for a New Economy", a joint effort of the Canadian Education Association and the Association of Universities and Colleges of Canada that will appear in the CEO of the Year edition of the *Financial Post Business Magazine*.
- Bi-weekly meetings with senior communications officers in the divisions have enabled better coordination and collaboration among representatives from all three campuses.

## **New Communications Materials**

- The process of refining the University's word and letter marks and the development of a style guide for their appropriate use was initiated and is ongoing as this is written. The process of overseeing the creation of the new word mark involved extensive University-wide consultation.
- During the past year, new communications materials in support of a revitalized annual giving program were developed and the process of unifying these new materials with all alumni communications was initiated.
- In addition, DUA maintained its ongoing activities in the areas of news services and bi-weekly production of the *Bulletin*.

## **Promotion of the University**

- The coordination, design and production of an advertisement in *Nature* magazine and a series of ads in *The Hill Times* promoting U of T research and scholarly expertise in key areas of importance to the Government of Canada were undertaken.
- Planning for the production of a television program aimed at high school students, parents and guidance counselors in the United States was initiated in collaboration with Student Recruitment. Three segments will air on Platinum Television in a series of "Today's Family" shows focused on education. Only one university or college will be highlighted on each show.
- The production of a video about the University was initiated in preparation for the President's Installation and for future student recruitment initiatives.

### ***3. Maintain the intensity of donor stewardship, cultivation and solicitation to ensure that the University continues to raise \$80-\$100 million per year in gifts and pledges.***

It is clear that the University's prospect pool has been substantially strengthened by the Campaign, and that there is solid potential for long-term growth. Over the past year, the University raised \$84.9 million in cash and pledges.



## Major Gifts

There are a number of individuals and foundations with the potential to make very significant gifts, provided the University continues to enhance its relationships with them, and is able to develop funding proposals that capture their imaginations. Ongoing intensive stewardship efforts with the 0.9 percent of donors who contributed \$100,000 or more to the Campaign serve as the cornerstone of our efforts.

## Stewardship

- Over 1,000 detailed financial reports for donors on the impact of their support were produced in 2004-2005. Many of these reports are coordinated with the divisions to ensure that our top donors are receiving the highest level of tailored, personalized stewardship. In addition, DUA facilitated efforts by the divisions to maintain contact with their supporters through personalized, regular follow-up on divisional priorities.
- As part of expanded stewardship efforts, DUA continued to acknowledge donors through appreciation letters, congratulatory letters and targeted donor relations correspondence. DUA sent 513 major gift appreciation letters, 116 letters congratulating donors on personal milestones, and 50 personalized letters to donors featured in a U of T publication (an advance copy of the publication was included in the mailing).
- DUA continued to work with the divisions to develop stewardship strategies and plans. An internal stewardship retreat provided the divisions with a forum to share best practices and gather information on how other divisions manage their stewardship programs and report back to their donors. Intensive stewardship support and strategic advice for selected divisions were provided as needed.
- Stewardship and prospecting strategy meetings to ensure the University of Toronto is consistent and coordinated in its fundraising and stewardship efforts continued. In total, 20 Stewardship Strategy Meetings and nine Prospecting Strategy Meetings were held in the last fiscal year.

## Involving Academic Leaders in Advancement

- The Division worked closely with Interim-President Frank Iacobucci's office to determine priority donor related meetings requiring his

involvement and tailored cultivation letters were sent to prospects where appropriate.

- Newly-appointed Principals and Deans attended an orientation session providing them with a full briefing on DUA programs with a special emphasis on major gifts.
- A strategy to contact all donors and prospects for whom Dr. Jon Dellandrea was the primary contact was established prior to his departure. A plan was devised for each of these individuals to ensure that another primary contact was assigned and an appropriate transition took place.

### **Prospect Identification**

Intensive efforts to identify new prospects were maintained and the goal of identifying a list of the top 400 of the new generation of potential donors capable of making a gift of \$1 million or more was reached. A cultivation strategy for each individual is in the process of being developed to ensure these prospects are the foundation of the next campaign.

### **Gift Planning**

The Campaign exceeded its \$200 million objective for future gift intentions. Realized bequests over the past three years have averaged \$12.6 million per year. Last year saw \$11.9 million realized payments on deferred gifts and \$13.6 million recorded in new bequest intentions – a substantial increase over the three year annual average of \$10.6 million in new gift intentions per year.

Over the past year, prospect identification for gift planning has been intensified through a comprehensive analysis of the database that takes into account a prospect's past interaction with the University and demographics. The results of this analysis will form the basis of a new, highly targeted marketing plan. In addition, a significant increase in constituency based gift planning mailings, editorial content and advertising in divisional newsletters, and cultivation events has been facilitated. Gift planning-related meetings with donors have more than doubled over the past year. These initiatives considerably raised the profile of gift planning among alumni and donors.

Programs aimed at informing faculty and staff about gift planning opportunities were introduced through pre-retirement and retirement courses organized by Human Resources.

Promotion of gift planning was strengthened by:

- The inclusion of gift planning information in a 20,000 piece Soldiers' Tower mailing.
- Providing gift planning information in the annual giving mail package and the on-line giving site.
- Providing eight training sessions throughout the year for Senior Development Officers to encourage and provide practical tools for the integration of planned giving in appeals to major donors.

Stewardship of planned-gift donors was improved through the following initiatives:

- A letter was sent to all confirmed gift planning donors. While the intention of this letter was the stewardship of donors, the response generated over \$50,000 in cash and securities donations.
- A review to ensure that all confirmed donors have been properly recognized.
- A "King's College Circle" society annual donor event at which attendance more than doubled over the previous year.
- Seasonal, birthday and spring reunion reminder cards sent to donors as appropriate.

### **Annual Giving**

The past year brought promising returns on the recent investments made in the University's annual giving programs. With the new call centre fully operational for the final three months of the fiscal year and a revitalized annual giving program well underway by that time, substantial progress was made on the goal of increasing financial results by 10 percent. In 2004-2005, annual giving results totaled \$14.2 million from over 36,000 donors – of whom more than 11,788 were new donors. In 2003-2004, annual giving totaled \$13.4 million<sup>1</sup> from more than 29,000 donors, of whom 6,446 were new donors.

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<sup>1</sup> The annual giving results in this year's report reflect new methodology for determining which gifts qualify for inclusion in the "annual giving" total. This change accounts for the difference of almost \$760,000 from the 2003-2004 annual giving total of \$12,640,883 reported last year.

**Divisional Annual Fund Segmentation:** For the first time in recent years, DUA conducted a Divisional Annual Fund effort that focused on segmentation by alumni affinity. This included personalized direct mail, tailored “ask amounts” (based on previous giving), scripts, direct mail text and images. Materials also emphasized the impact of annual support as part of DUA’s efforts to provide better stewardship to annual giving donors.

As a result, direct mail response rates for donors improved substantially, with overall results increasing from \$960,741 to \$1,498,633, representing a 56% increase from 2003-2004.

**Call Centre:** In only three and half months of calling from the new call centre, student callers were able to secure over \$1.35 million in pledges, a substantial increase over the previous year’s results of just over \$400,000. In 2004-2005, 17,102 pledges were generated through the call centre, compared to 5,859 in the previous year. Due to the enhanced scripting and the segmentation capabilities of new software, the average gift secured through the call centre increased by 17%, from \$68.77 to \$80.32. The increase to sixty calling stations from twelve enabled the centre to secure 3,000 new first-time donors to the University of Toronto.

**E-Solicitations:** The University of Toronto Annual Giving Program initiated a pilot project for the use of the E-solicitation, personalized by divisional affinity. Close to 69,000 emails were disseminated and resulted in a total of \$74,644 in contributions from more than 150 donors, with a top gift of \$7,500.

**Parents Fund:** A Parents Fund initiative began that included a pre-call brochure, targeted messages that resonate with parents, and the identification of Parents Fund Chairpersons. The effort produced a higher pledge percentage than the general alumni audience and, in only three weeks of calling, almost \$300,000 was generated from nearly 3,500 donors, in spite of the fact that less than half of the available phone numbers were called due to capacity issues prior to the opening of the new call centre.

***4. Ensure that the UTAA, the President's International Alumni Council and divisional alumni groups continue to evolve as effective means for alumni to build and maintain meaningful relationships with their university. In addition, continue to develop new programs and services for alumni (family events, young alumni events, travel) and***

*expand affinity programs beyond their current base of 50,000 client accounts.*

The University of Toronto currently has more than 400,000 living alumni. These individuals have the potential to play a key role in resource generation, student recruitment, and government relations.

### **Support of Alumni Organizations**

- Alumni from across the province, along with PIAC members, were mobilized to lobby in support of the Rae Review recommendations.
- In conjunction with the UTAA leadership, existing administrative functions were reviewed and more efficient mechanisms for support were put into place.
- The momentum generated by the inaugural meeting of the President's International Alumni Council continued into this year with ongoing opportunities for the Council members to interact with and support the Interim-President. Forty-two of the Council's 75 members attended the second annual assembly held in May 2005. Of the 17 newly recruited members, 11 were in attendance and 25 of 36 who participated in 2004 returned. An additional six members who did not attend the first assembly participated in 2005.

### **Local and Regional Alumni Programs**

- DUA undertook a review of all current alumni programs in order to capitalize on cross promotional opportunities with other programs.
- A professional event manager was added to the staff complement to ensure consistent, high-quality event execution and to allow alumni staff to focus more closely on establishing and building relationships with alumni at events.
- Young alumni programming was increased, including the expansion of the highly successful "Shaker" series of events.

More than 70 alumni and student recruitment related events were held outside of the GTA over the past year. A full listing of events can be found in Appendix G. Many of these events featured faculty speakers and senior University representatives. Some notable events included:

- A reception was held at First Nations University in Regina.

- In the United States, an event was held at the Albright-Knox Gallery in Buffalo, NY and a high profile partnership was established with the Smithsonian Institution in Washington DC for the “Great Schools” Forum which featured distinguished U of T Faculty speakers.
- “U of T Bound” events for newly admitted U of T students and their parents were held in Washington, Boston and New York City. DUA also hosted a post-concert reception to celebrate Measha Bruggergosman’s debut at Carnegie Hall in New York City, and participated in “All-Canadian” events in Seattle, New York, Atlanta, and Minneapolis,
- In Europe, DUA organized an alumni reception in Athens during the Olympics.
- In Asia, DUA organized the inaugural Asia Alumni Congress. The Congress was held in Kuala Lumpur in April 2005 and was officially opened by University of Toronto Chancellor Vivienne Poy. Fifty-two alumni delegates from nine countries traveled to Kuala Lumpur to take part in a full weekend of activities that featured an opening reception at the residence of the Canadian High Commissioner to Malaysia, a half-day alumni speaker program and an information session for prospective U of T students from Malaysia. Alumni speakers from around the region presented the latest Asia-Pacific business topics and explored the Congress theme of *Crossing Borders: Networking in the New Asian Economy*. Speakers included Dr. David Chu (LLD 1997), Chairman of Mission Hills Ltd. of Hong Kong; Dr. Patrick Fung (BASc 1971, MBA 1973, LLD 2005) Chairman of Wing Hang Bank Ltd. of Hong Kong; and Dr. Liu Chao-Shiuan (PhD 1971), President of Soochow University in Taiwan.

### **Alumni Recognition and Contact**

In addition to focusing on university-wide alumni programming, the Division devotes considerable effort to ensuring highly personalized communications with alumni. A review of the communications materials used by all alumni programs commenced in 2004-05. The objective was to establish a consistent look and messaging in order to facilitate communication between the University and alumni.

- A personalized e-mail was sent from Interim-President Iacobucci to all alumni in areas affected by the Asian tsunami that expressed the University’s concern and sorrow. The response of recipients was most appreciative.

- In the past year, the Division generated 869 condolence letters to alumni and over 460 letters of congratulations. Many of these communications are to alumni who have had no involvement or connection with U of T since graduation. The response of recipients continues to be appreciative.
- In addition to sending out a monthly e-newsletter to 76,000 of the University's alumni for whom e-mail addresses are available, the Division provides the tools and the expertise for between 10 and 15 individual colleges and faculties to generate their own newsletters on a regular basis.
- Promotion and recognition of the achievements of U of T faculty, staff, alumni and students takes place through a number of award recognition programs including the Awards of Excellence, and the Arbor and Cressy Awards. In 2004, 93 outstanding alumni volunteers received the Arbor Award for their service to the University and 160 student volunteers received the Cressy Award for their extra-curricular contributions.

### **Affinity and Marketing Programs**

- DUA continues to grow Canada's largest non-philanthropic revenue program (affinity programs, sponsorship, tours, etc.) beyond its 2003-2004 base of 50,000. As of April 30, there are now 60,000 client accounts.
- DUA demonstrated leadership in this area by hosting a highly successful conference on non-philanthropic revenue generation programs. This was the first conference of its kind in Canada, and attracted more than 100 participants from 34 colleges and universities across the country, along with more than 30 commercial partners representing travel, credit card, and insurance providers, among others. This initiative received some of the highest satisfaction ratings of any recent conference held under the CCAE (Canadian Council for the Advancement of Education) banner.
- Through DUA, the University continues to play a leadership role in Canada by monitoring suppliers of all University trademarked merchandise to ensure that appropriate fair labour standards are followed in their manufacture.
- The campus-based merchandising programs have successfully been expanded into the public retail environment by being the

featured university at “World U”, a new store in the Vaughan Mills Mall.

***5. Restructure the Division of University Advancement as required to build on the Campaign's success and best prepare it for the next major advancement initiative.***

Since January 1995, the structure, program design, and staff deployment in the Division of University Advancement have been focused on actively preparing for and executing a major campaign. Over the past year, an administrative review of Divisional processes and structures was undertaken to ensure that existing capacity is sufficient to support the next major campaign. While some aspects of this review have been delayed due to the postponement of the final decision about public affairs, the following initiatives were implemented as a result of the review:

- The need to significantly increase our donor base and at the same time build a predictable source of expendable money for the divisions led to the decision to reallocate a major portion of our budget to the creation of one of the largest university call centres in North America at 89 Chestnut. This new call centre is critical to the University's ability to capitalize on the continuing growth of its alumni base, as well as its efforts to increase the ranks of alumni donors beyond the 81,769 alumni who supported the Campaign. It is anticipated that the call centre will significantly increase the size of the University's donor base as well as the revenues produced through annual giving.
- As mentioned previously, the issues around public affairs and communications including structure, quality of service, U of T design consistency, web issues and duplication were a part of the public affairs review.
- An examination of the budget (base and campaign) led to a submission to the President and Provost proposing that the base budget of DUA be increased by the amount of the campaign budget. This became effective May 1, 2005 for a period of three years. This will allow DUA to continue to build on the post-campaign revenue generation plateau of \$80-100 million a year and will provide the new President and the new Vice-President the time required to plan for the next campaign.



- The Campaign agreements with the Federated Universities were extended for an additional 5 years. Among many things the agreement deals with prospect clearance and the use of the Development Information System (DIS).
- Outdated Divisional policies were examined, rescinded and replaced with a document similar to the Provost's Guidelines on Donations entitled, "Guidelines on Fundraising Strategy and Programs at the University of Toronto".
- The Division's programs were examined in light of University-wide budget cuts. Many were revamped (Send Offs) and others added, such as the "Shaker" series for alumni 10-15 years after their graduation. Decisions were based on cost, alumni attendance, interest and input from divisional alumni officers.
- An examination of the organizational structure and funding of development staff in the University's faculties, colleges, and schools is being undertaken and recommendations will be presented to the Provost in 2005-2006.
- A review of the DIS system is underway. While DIS has served the University's needs throughout this campaign, its creation and ongoing improvement is extremely expensive, relative to the cost of a pre-existing commercial system. It will be critical for the Division to ensure that its information management system will have the capacity to address the needs of the next campaign in a cost-effective manner.
- Mailing costs of the *U of T Magazine* go up each year by the number of new graduates. Options for reducing costs, including offering a web based magazine to those that wish to receive it electronically, as well as other means to generate offsetting income, such as an increased voluntary subscription campaign, are being examined. As in the case of the call centre, further discussions are required to assess the impact of an increasing alumni base on the overall budget.
- The structure and status of the Hong Kong Office, and the major projects it operates including the biannual convocation and ongoing support of student recruitment are being reviewed.
- In preparation for the next campaign, a review of the donation levels associated with the naming of chairs, professorships, named

scholarships, faculties, schools departments and all naming for capital projects is underway.

- Web-based services to alumni are also being examined. The University was innovative 10 years ago in this aspect of its service delivery; now, however, its web sites are dated. This major review will commence in the coming year.

## 2005-06 Division of University Advancement Objectives

Plans for 2005-2006 take into account key findings from the *Report of the Committee Reviewing the Office of the Vice-President and Chief Advancement Officer*. It is noted that decisions made about Public Affairs/Communications over the coming year may require the Division to revise its plans accordingly.

The following points are taken from the Division's submission and presentation to the retreat of the President and Vice-Presidents on August 30, 2005.

### *1. Development*

In the coming year, the Division will maintain its commitment to build on the post-campaign plateau of raising \$80 to \$100 million per year in support of the University's academic priorities. To prepare for the University of Toronto's next major campaign, DUA will:

- Work with the divisions to develop the new Advancement Catalogue of approved academic priorities.
- Expand the list of top prospects by 25% from 400 to 500 individuals, foundations, corporation, and organizations.
- Integrate President Naylor into the cultivation, stewardship, and solicitation of major donors, as appropriate.
- Provide personalized stewardship to major donors and generally intensify stewardship efforts across all giving areas.
- Maximize support for student financial assistance through the Ontario Trust for Student Support (OTSS) and the Graduate Student Endowment Fund (GSEF) matching program.
- Complete a new Awards Reference guide.
- Increase the value of new confirmed future bequest and other deferred gift intentions by 10% from the \$13.6 million recorded in 2004-05.

- Increase the number of donors and the level of Annual Giving by 10%.
- Work with the University's academic leadership to develop a framework for the establishment of an advancement program that targets the parents of students.
- Review the University's Naming Guidelines to ensure both their consistency and their ability to serve institutional objectives.

## *2. Alumni Affairs*

Over the past decade, more than 80,000 alumni made gifts to the campaign, and approximately 60,000 have participated in affinity marketing programs. Alumni advocacy was also highly valuable to the university's efforts over the past year to improve Ontario's financial support of colleges and universities. Our graduates also play a valuable role in student recruitment and support through "send-off" receptions. Further, the creation of the call centre has the potential to dramatically strengthen alumni outreach and mobilization.

Over the coming year, we will undertake a comprehensive review of our alumni programs both across the institution, and at the divisional level, to determine the most appropriate structure and programming to enhance the university's relationships with its 400,000 alumni. We will:

- Create a five-year plan for alumni affairs.
- Complete the construction of a new web site for Alumni and Friends.
- Build on the momentum created by the 2004 and 2005 PIAC assemblies to utilize PIAC members in support of the University.
- Establish a full service secretariat to support the work of the University of Toronto Alumni Association and the President's International Alumni Council and to help identify potential alumni volunteers.
- Continue to acquire new clients for our Affinity Marketing Programs and ensure that alumni receive competitively priced high quality products and services which in turn generate revenue for the University.

- Harmonize the many disparate communications vehicles and messages alumni receive from the University.

### ***3. Public Affairs/Communications***

The Department of Public Affairs continues to address the institution's communications needs. The following initiatives are planned for 2005-06, with the understanding that some or all of these activities may be altered once the University has made its decision regarding the future of Public Affairs/Communications:

- Complete the refinement of the University's word mark and development of the style guide for implementation beginning mid-October 2005.
- Complete the *President's Report* by November 15, 2005. Intended to serve as the first widely disseminated communication from President Naylor, the report will demonstrate that the University is on sure footing and moving forward enthusiastically. It will re-establish the U of T's national and international profile to an audience that will include government decision-makers and other major stakeholders, including alumni, donors and the media.
- Successfully complete the collaboration on the production of the "Today's Family" television program on Platinum Television. The programs will result in three seven-minute segments devoted exclusively to the University of Toronto. The target audience is students, parents and high school counselors in the United States. It is expected that the show containing the U of T segment will be aired 50 times in urban markets across the United States on the ABC Family Channel, PAX-TV, Hallmark Channel, and America One. The University will also use the seven minute segment as a recruitment tool following its production.
- Complete the production of a video about the University using existing and new footage that will be shown at the President's installation, and also can serve as an introduction for visitors to campus and for student recruitment purposes.
- Coordinate production of an advertisement for the *Globe and Mail's* Performing Arts supplement highlighting the arts at the University with the Provost's office, the Faculty of Music and Hart House.

- Continue to bring archival copies of the *University of Toronto Magazine* online (from 2000 on).
- Continue to manage issues and crisis communications.
- Continue to hold bi-weekly Communications meeting.

#### ***4. Divisional Engagement***

The success of future advancement efforts will depend on collaboration with and support of the University's divisionally based advancement offices. To that end, DUA will continue to support divisional advancement efforts through the provision of services such as prospect identification and research, assistance with the preparation of proposals and donor communications materials, assistance with gift planning and annual gifts, and professional development, among others. Over the next year, specific objectives include:

- Review the mechanism for the allocation of advancement budgets and staff to the divisions.
- Complete the hiring of senior advancement staff for the divisions.
- Determine and implement the optimal approach for deploying central advancement staff and resources to address the unique advancement needs of the smaller faculties, colleges, and schools within the University of Toronto.
- Organize a large scale internal conference for DUA and constituency-based advancement staff members in January 2006.
- Determine the optimal balance of alumni activity between the central advancement operation and the divisional alumni offices.
- Assist with the development of the divisional cases for support.
- Continue active interportfolio collaboration in the development of communications materials and programs.
- Create an ongoing vehicle to facilitate information sharing among DUA and constituency-based advancement staff.

### ***5. Administrative Review***

Over the coming year, DUA will complete the post-campaign administrative review initiated in 2004-05. This process will also consider the findings of the *Report of the Committee Reviewing the Office of the Vice-President and Chief Advancement Officer* and the results of the upcoming alumni program assessment. Key aspects of the administrative review process for 2005-06 include the following areas:

- DUA will finalize the revised Divisional staffing structure following the decision by the University on the future of the Department of Public Affairs.
- Over the next year, DUA will complete the review and analysis of our technical infrastructure; continue to develop a web-based reporting platform to facilitate information-sharing with the divisions; continue the creation of mechanisms to capture donations data from affiliated institutions such as the Toronto School of Theology, Knox College, Wycliffe College, and Massey College; develop a strategy for more proactive acquisition of home and business addresses, phone numbers, e-mail and employment information for alumni, donors and friends on our database.
- On the recommendation of the Advancement Compensation Committee, DUA will review the Advancement Professional staff member classifications and will develop consistent criteria for assigning designations within the "Advancement Professional" job classification system.
- DUA will ensure that our practices and internal policies are fully compliant with provincial and federal privacy regulations.
- By early 2006 DUA will develop a national disclosure service for all universities involved in selling collegiate apparel.
- DUA will work with the Provost's office to determine the method of allocating DUA costs as part of the new budget model. We will also review the budgetary impact of the University's growing number of alumni and the related costs associated with the expanded call centre.
- DUA will review the accounting standards for donations, utilizing the most recent standards prepared by the Council for the Advancement and Support of Education (CASE). There is a critical need to ensure that the reporting mechanism for the next

campaign reflects our accomplishments in comparison with peer institutions.

- DUA will review the effectiveness of programs aimed at obtaining support outside Canada, supporting international student recruitment and profile building, and encouraging the involvement of international alumni. This review will also consider the structure and status of the Hong Kong Office and the major projects it operates including the biannual convocation and ongoing support of student recruitment



## Conclusion

In order to meet the ambitious objectives of Stepping UP, the University of Toronto must enhance its ability to attract private support, build upon and broaden its public profile, and build closer relations with its alumni. The University's accomplishments over the past decade have provided a strong baseline of support, a dedicated and talented staff, and a strong nucleus of alumni and community leaders to support the efforts of the academic leadership. Over the next year, DUA will work with academic and alumni leaders, and with constituency advancement staff, to build the structure for a successful campaign in support of the academic objectives of the University of Toronto.

## Appendix A

Annual Fundraising Achievement for the Year Ending April 30, 2005

<b>Donations</b>	<b>Pledged</b>
Pledges & Gifts	\$ 61,940,319
Realized Planned Gifts	12,708,864
<b>Sub-Total</b>	<b>74,649,183</b>
Gifts-in-kind	10,284,088
<b>Total to Date</b>	<b>\$ 84,933,271</b>

<b>Government Funds : OSOTF II, OGSST, OGS</b>	
<b>Total from government</b>	<b>\$ 18,162,671</b>

<b>Future Bequest Intentions and Other Deferred Gifts</b>	<b>\$ 20,858,695</b>
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**Notes:**

Annual fundraising results include totals for University of St. Michael's College, University of Trinity College and Victoria University.

## Appendix B

### Divisional Annual Fundraising Achievement for the Year Ending April 30, 2005

<u>Division</u>	<u>Pledges and Gifts****</u>
Applied Science and Engineering	2,663,633
Architecture, Landscape and Design	554,984
Arts & Science	5,079,717
Dentistry	2,616,257
Forestry	87,032
General University*	3,743,841
Graduate Studies/Graduate Institutes & Centres	1,128,426
Hart House	644,838
Information Studies	567,074
Innis College	128,140
Institute of Child Study	675,956
Joseph L Rotman School of Management	14,175,782
Law	2,205,162
Leslie Dan Faculty of Pharmacy	3,413,659
Library**	9,251,031
Medical Alumni Association	2,892
Medicine	15,817,032
Music	1,576,530
New College	267,562
Nursing	1,075,802
OISE/UT	196,277
Physical Education & Health	1,198,281
School of Continuing Studies	6,343
Social Work	3,324,439
Student Affairs	12,554
Student Services	13,657
Transitional Year Programme	207,953
U of T at Mississauga	1,272,620
U of T at Scarborough	352,641
UTS	337,672
University College	2,549,869
University of St Michael's College	2,298,352
University of Trinity College	1,033,252
Victoria University***	5,937,502
Woodsworth College	516,510

\* General University includes: Fields Institute, Knox College, Massey College, Research, Student Awards, President's Fund, Teaching Hospitals and UofT Press

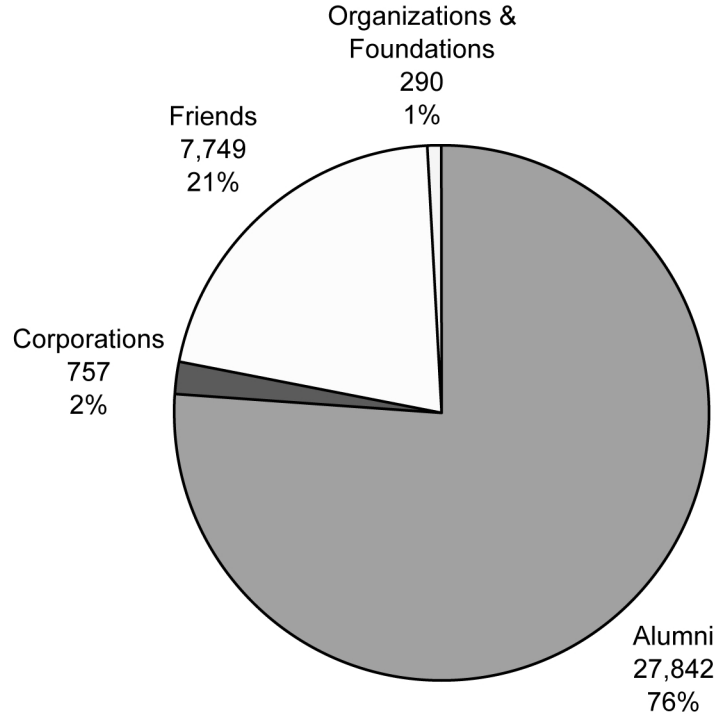
\*\*Library total includes \$8,868,159 in Gifts in Kind

\*\*\* Victoria University includes Emmanuel College

\*\*\*\*Includes realized bequests

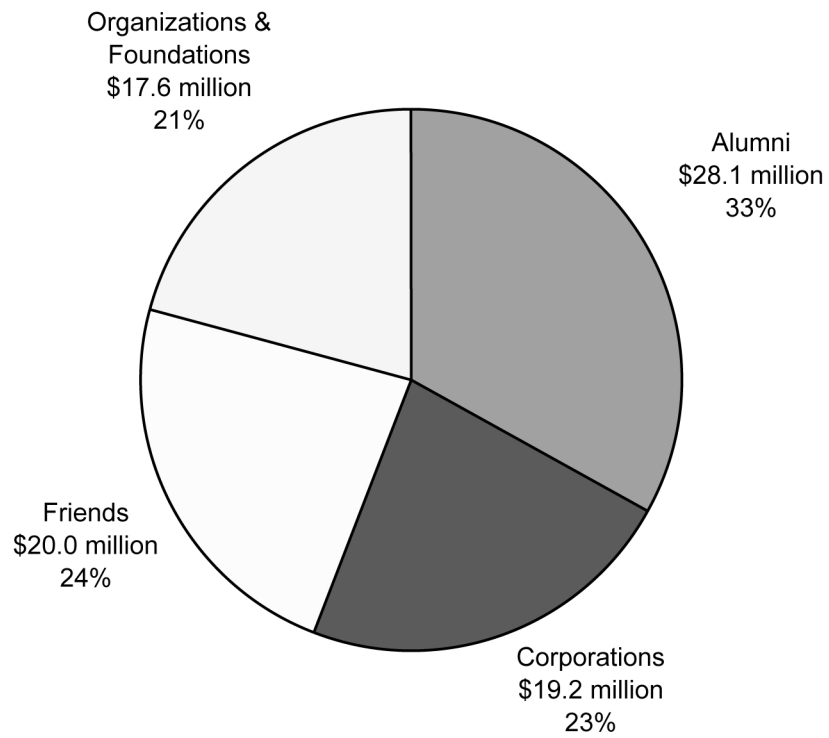
## Appendix C

### Annual Fundraising Achievement for the Year Ending April 30, 2005 Donors by Sector Number of Donors: 36,638



## Appendix D

### Annual Fundraising Achievement for the Year Ending April 30, 2005 Giving by Sector



**Appendix E**

*Reconciliation Between University  
of Toronto Audited Financial  
Statements & Annual Received Gifts*

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*May 1, 2004 - April 30, 2005*

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**Audited Financial Statements 04/05**

Monetary Gifts	\$65,225,368	
Gifts-in-kind	<u>17,443,581</u>	<b>\$ 82,668,949</b>

**Received Gifts****University of Toronto:**

Monetary Gifts	\$65,225,368	
Gifts-in-kind	<u>17,443,581</u>	\$82,668,949

**Federated Universities:\***

University of St. Michael's College	2,072,057	
Victoria University	5,910,247	
University of Trinity College	<u>3,071,907</u>	11,054,212

**Other**

Massey College		51,825
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Total Received Gifts		<u>\$93,774,986</u>
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The above figures include payments on pledges.

\*These figures include those donations directly received by the University of St. Michael's College, University of Trinity College, Victoria University.

**Appendix F**

AWARDS RECEIVED BY THE  
DIVISION OF UNIVERSITY ADVANCEMENT

**CASE Circle of Excellence**

SILVER Visual Design in Print, *University of Toronto Magazine*,  
“Why Good People Do Bad Things”

**CASE District II Accolades Awards**

SILVER Best Article, *University of Toronto Magazine*, “Courage Under Fire”  
BRONZE Magapapers, Newsprint, *The Bulletin*  
HONORABLE MENTION Excellence in News Writing—Research, Medical, and  
Science News Writing

**CCAE Prix d’Excellence**

GOLD Best E-Innovation in University Advancement,  
University of Toronto Alumni Video  
GOLD Best Photograph, *University of Toronto Magazine*  
SILVER Best Writing/Article – English Language, *University of Toronto  
Magazine*, “Why Good People Do Bad Things”  
BRONZE Best Newspaper, *The Bulletin*

## Appendix G

### REGIONAL PROGRAMMING

#### May 2004

Boston, MA	All-Canadian Alumni Event	May 1
Hong Kong	APSC Alumni Reception	May 4
Oshawa, ON	Alumni Reception	May 12
Beijing, China	Alumni Reception	May 13
Vancouver, BC	Post-Offer Reception	May 18
Victoria, BC	Post-Offer Reception	May 19
Calgary, AB	Post-Offer Reception	May 19
Kingston, ON	Alumni Reception	May 27
Hong Kong	Alumni Reception	May 27

#### June 2004

Victoria, BC	Annual General Meeting	June 3
Seattle, WA	Alumni Baseball Game	June 3
Windsor/Detroit, MI	Alumni Pub Night	June 4
Ottawa, ON	Post-Offer Reception	June 8
Kingston, ON	Post-Offer Reception	June 9
Vancouver, BC	Annual SOAR Barbeque	June 12
Windsor/Detroit, MI	Alumni Pub Night	June 19
Singapore	U of T Bound	June 24
Vancouver, BC	Annual General Meeting	June 26

#### July 2004

Taipei, Taiwan	U of T Bound	July 5
Los Angeles, CA	Alumni Reception	July 13
Kingston, ON	U of T Bound	July 13
Ottawa, ON	U of T Bound	July 14
Barrie, ON	U of T Bound	July 20
Shanghai, China	Canadian Universities Send-Off	July 25
Guelph, ON	U of T Bound	July 27
Montreal, PQ	U of T Bound	July 28
Trinidad	U of T Bound	July 29
Hamilton/Niagara, ON	U of T Bound	July 29
Hong Kong	U of T Bound	July 31

#### August 2004

Edmonton, AB	U of T Bound	Aug 3
Calgary, AB	U of T Bound	Aug 4
Vancouver, BC	U of T Bound	Aug 5
Halifax, NS	U of T Bound	Aug 5
London, ON	U of T Bound	Aug 10
Windsor, ON	U of T Bound	Aug 11
Seoul, South Korea	U of T Bound	Aug 12
Boston, MA	U of T Bound	Aug 16
Peterborough, ON	U of T Bound	Aug 18
Washington, DC	U of T Bound	Aug 18



Athens, Greece	Alumni Reception	Aug 22
New York, NY	U of T Bound	Aug 26
<b>September 2004</b>		
Singapore	Speaker Luncheon	Sep 28
New York, NY	All-Canadian Reception	Sep 30
<b>October 2004</b>		
St. John's, NF	Alumni Reception	Oct 1
Montreal, PQ	Alumni Reception	Oct 5
Seattle, WA	5 <sup>th</sup> Annual All-Canadian Gala	Oct 8
Stanford, CA	Alumni Reception	Oct 25
Singapore	Engineering Alumni Reception	Oct 28
Chicago, IL	All-Canadian Reception	Oct 29
<b>November 2004</b>		
Regina, SK	Alumni Reception	Nov 3
Seoul, South Korea	Alumni Reception	Nov 11
Taipei, Taiwan	Alumni Reception	Nov 18
Hong Kong	Hong Kong Foundation Annual Meeting	Nov 22
<b>December 2004</b>		
Victoria, BC	Christmas Dinner	Dec 2
New York, NY	Alumni Concert	Dec 3
Guelph, ON	Alumni and Friends Reception	Dec 7
<b>February 2005</b>		
Mississauga, ON	Alumni Reception	Feb 9
Atlanta, GA	All-Canadian Reception	Feb 17
Coral Gables, FL	Florida All-Canadian Event	Feb 18
Sudbury, ON	Alumni and Friends Reception	Feb 26
Victoria, BC	Post-Offer Reception	Feb 28
<b>March 2005</b>		
Buffalo, NY	Alumni and Friends Reception	Mar 3
Vancouver, BC	Post-Offer Reception	Mar 3
Berlin, Germany	Alumni Reception	Mar 4
Calgary, AB	Post-Offer Reception	Mar 4
<b>April 2005</b>		
Coral Gables, FL	All-Canadian Alumni Dinner	Apr 7
Kuala Lumpur, Malaysia	Asia Alumni Congress	Apr 8-10
Washington, DC	All-Canadian Alumni Reception	Apr 9
Ottawa, ON	Alumni Reception	Apr 11

## **Appendix H**

### UTAA BOARD OF DIRECTORS

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*President-Elect*

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Mr. Tony Clement

Dr. Jon S. Dellandrea  
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*Vice-President, Governance*

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Mr. Frederick Kan

Ms. Eira M. Thomas

*Treasurer*

Ms. Daina Groskaufmanis

Ms. Evelyn Wong

## **Appendix I**

### ALUMNI GOVERNORS

Dr. Robert M. Bennett

Ms Susan Eng

Dr. John P. Nestor

Ms Jacqueline C. Orange

Mr. Timothy Reid

Ms Marvi H. Ricker

Mr. Stephen C. Smith

Miss Maureen J. Somerville

## Appendix J

### REGIONAL ALUMNI CONTACTS

#### ACROSS CANADA

##### *Barrie, Ontario*

Donald Dowds (BASc 1953)

##### *Halifax, Nova Scotia*

Bruce Russell (JD 1979)

##### *Hamilton, Ontario*

Tia Geminiuc (BSc 1993 UTM)

##### *Montreal, Quebec*

Susan Darlington (BLS 1970)

##### *Muskoka/Bracebridge, Ontario*

Catherine Cherry (MEd 1984 OISE)

##### *Newfoundland*

Ashley Morton (BASc 2003)

##### *Ottawa, Ontario*

Dillan Theckedath  
(BA 1998 SMC)

##### *Vancouver, British Columbia*

Benjamin Garfinkel (BCom 1992 UTM)

##### *Victoria, British Columbia*

Beverley Straub Watkins (BA 1967 VIC)

##### *Windsor*

Jo Anne Foote (HBA 1996 UTSC)

##### *Winnipeg, Manitoba*

Douglas Hutchings (BA 1950 VIC)

#### ACROSS THE UNITED STATES

##### *Atlanta, Georgia*

Philip Roberts (BASc 1990) and  
Nancy Bock (BA 1987 UTSC)

##### *Boston, Massachusetts*

Tami Kaplan (BA 1985 UC)

##### *Chicago, Illinois*

David Frankel (BA 1994 UC)

##### *Denver, Colorado*

Brian Matsumoto (BA 1977 UTSC)

##### *Florida*

Ken Evans (BASc 1946)

##### *New York, New York*

Gary Kaufman

##### *Northern California*

###### *Berkeley area:*

Kit Soo (HBSc 1995 UTSC)

###### *Bodega Bay area:*

Mary Louise Riley (BA 1948 TRIN)

##### *Phoenix, Arizona*

Bill Aziz (BASc 1987)

##### *Seattle, Washington*

Ben Dehghan (BASc 2000)

##### *Southern California*

Susan Brauch  
(BA 1974 TRIN, BEd 1975 OISE)

##### *Tucson, Arizona*

David Loynd (BCom 1984 WDW)

##### *Washington, D.C.*

Paul Cadario (BASc 1973) and  
Jean van der Tak  
(BA 1948 UC)

**AROUND THE WORLD****Argentina**

Gustavo Rochwerger (MEng 1997)

**Australia***Brisbane*

Elizabeth Parker  
(BA 1973 WDW, MSW 1975, DEd 1991)

*Melbourne*

Judith Walker (BSW 1964)

*Sydney*

Natalie Lam (HBA UC 2004)

**Bermuda**

Richard Butterfield (BA 1951 TRIN)

**China***Hong Kong Alumni President*

Gigi Pang (BA 1993 UTSC)

*Hong Kong Office*

Jeremy Woodall (HBA 1999 INNIS)

*Beijing*

Kevin Leung (BASC 1998)

*Shanghai*

Queenie Lo (HBSc 1999 UC, MA 2002)

**Dubai**

Aseem Aziz (MEng 1990)

**Costa Rica**

Francis James (BA 1997 SMC)

**England**

Michael Lucas Klosowski (BA 1993 TRIN)

**Finland**

D'Arcy Salzmann (BA 1995 UC)

**France**

Mark Adam (BA 1985) and  
Jens Van Vliet (BMus 1985, BEd 1986)

**Germany**

Mary Kwok (HBSc 1995 WDW)

**Hawaii**

Michael Brockert (MA 1989)

**Israel**

Stephen Glazer (BA 1968 UC)

**Japan**

Shiro Kiyohara (BA 1960 UC) and  
Miki Tomoeda (BSc 1989 UC)

**Korea**

Simon Moon (ThM 1987, MA 1989, PhD 1996)

**Macau**

Fred KC Kan (BASC 1964, JD 1967)

**Mauritius**

Jerry Ng Tin Sze (BASC 2002)

**Mexico**

John Anthony Gardner  
(BA 1991 TRIN, MA 1993) or  
Ian Jarvie (BA 1993 TRIN) or  
Louisa Peat O'Neil (BA 1975 WDW)

**New Zealand**

Kimberley Powell (BA 1983 VIC)

**Philippines**

Genandrialine L. Peralta  
(MASc 1994, PhD 1997) and  
Francis Uy (BASC 1989)

**Saudi Arabia, Bahrain, Qatar, Oman,  
United Arab Emirates**

Raj Malik (BASC 1981)

**Singapore**

BC Lee (MASc 1997) and  
Keff Tang (BSc 1986 UTSC) and  
Evelyn S. Wong  
(BSc 1972 NEW, MBA 1974, MIR 1980)

**Sri Lanka**

Jean-Philippe Linteau (MSc 1996)

**Trinidad**

Angini Mohammed (BA 1994 VIC) and  
Anthony Smart (BA 1968 UC)

**Turkey**

John McKeown (ArtD 1983, BEd 1987 OISE, MA 1995)

**Vietnam**

Linh Phan (HBA 1996 INNIS)

## **Appendix K**

### UNIVERSITY OF TORONTO HONG KONG FOUNDATION

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Dr. Cheng Yu-Tung

#### *Chairman*

Dr. Patrick Fung

#### *Past Chairman*

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Wong Yick-Ming

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Mrs. Rita Liu  
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Mr. Johnny Chan  
Mr. Kevin Chan  
Mr. Vincent Cho  
Mr. Fred Kan  
Mr. Benjamin T. Lee  
Mr. Andrew Lo  
Prof. Evelyn Man  
Dr. Harry Pang  
Dr. Patrick Shiu  
Mr. Tommy Tse  
Ms. Laetitia Yu

## **Appendix L**

### THE ASSOCIATES OF THE UNIVERSITY OF TORONTO, INC.

#### *Members And Directors*

Paul M. Cadario, President  
Kenneth D. Taylor, Vice-President  
Tad Brown, Vice-President  
Rivi Frankle, Secretary  
Gary Kaufman, Treasurer  
Bonnie Fuller, Member  
Ernest Goggio, Member  
Jon S. Dellandrea, *ex officio*

**Appendix M**

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Richard Alway	Daina I. Groskaufmanis	John Polanyi
Geoffrey Bannister	Alexander Himelfarb	Poonam Puri
Sheela Basrur	Frank Iacobucci	John P. Rochon
Mordechai Ben-Dat	Michael G. Ignatieff	Ellen B. Roseman
W. Ian C. Binnie	Sandra Lee Irving	Peter J. Sahlas
Robert J. Birgeneau	Richard W. Ivey	Susan Scace
Harvey Botting	Norman F. Jewison	Thomas H. Simpson
Brian C. Burchell	F. Ross Johnson	Anthony I. Smart
Paul M. Cadario	Frederick K. C. Kan	Yijun Song
Melvin S. Cappe	Tae-Jin Kang	Catherine S. Swift
Wendy M. Cecil	Yasuji Kasuya	Kenneth D. Taylor
Agnes Chan Miling	V. Maureen Kempston Darkes	Eira M. Thomas
Tony P. Clement	Michael F. Kergin	Barbara J. Thompson
Michael J. Cobden	Walter Kohn	Kim Vicente
David L. Crane	Chao-Shiuan Liu	Vaira Vike-Freiberga
Philip J. Currie	Kathleen M. MacMillan	Evan H. Walker
Elizabeth M. Davis	Theodore Roosevelt Malloch	Bruno J. Wall
Michael C. Deck	Audrey M. MacLaughlin	Paul C. Weiler
Edward Doolittle	Joseph A. Medjuck	Marni Weishofer
Lindsay Duffield	Paul Martin Meyer	Evelyn S. Wong
Kathryn Feldman	David R. Miller	Rosanna Wong
Bonnie J. Fuller	Carl O. Mitchell	Janet Yale
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	David Mulronev	Edward Zeng